

Clarity New Interface Workflow Training

211

Get Connected. Get Help.™



Orange County
UNITED WAY

Q&A



To better organize questions the HMIS Help Desk receives during the training, our team recommends that you submit your questions through the Q&A option.

We request that you keep your questions general and related to the topics discussed in the training.

Agency specific questions is best supported through a HMIS Help Desk ticket submission, so our Team is able to further investigate and provide assistance for your request.

Agenda

1. Creating a Client Profile
2. Household Management
3. Program Enrollments
4. Notes
5. Services
6. History Tab
7. Program Exits
8. Enroll Client into CES Project
9. Upload CES Documentation
10. Send Referral to Community Queues
11. Keep a Client Active on Community Queues
12. Bed Reservation Workflow
13. Add Housing Opportunities
14. Review Pending Referrals
15. Exit Client from CES Enrollment

***Some functionality is still being updated for the new interface and we have escalated a few issues to our vendor as bug fixes.**

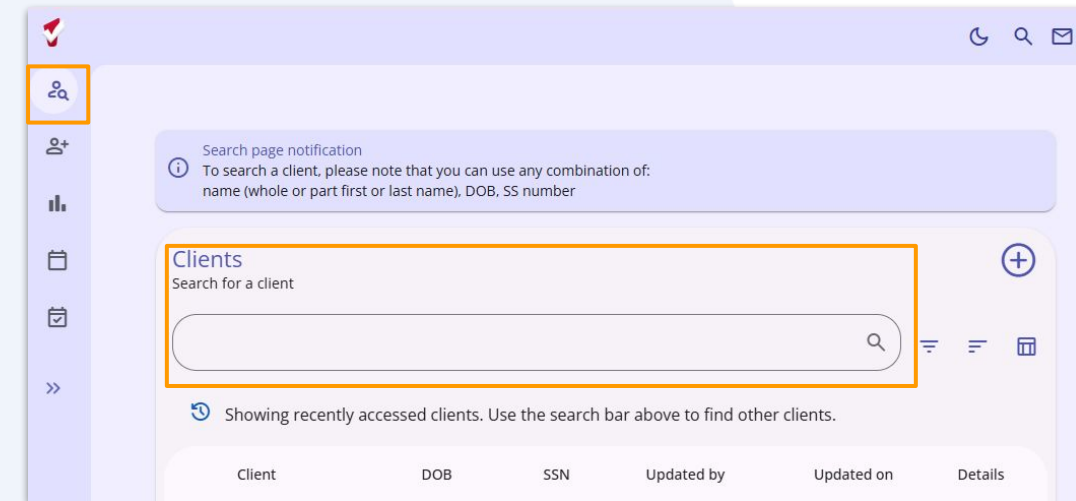
Meeting materials and recording will be available on the [OC HMIS website](#)

Client Profile Search

Prior to creating a new client, we must first search to see if the client is already in the OC Clarity system. You may search using a client's:

- Partial or full UID (Unique Identifier)
- First name or last name (full or min first 3 letters)
- Full Social Security Number or last 4 digits
- Date of Birth
- Birth Year
- Client ID

A list of recently viewed clients can be found below the search bar for quick access.

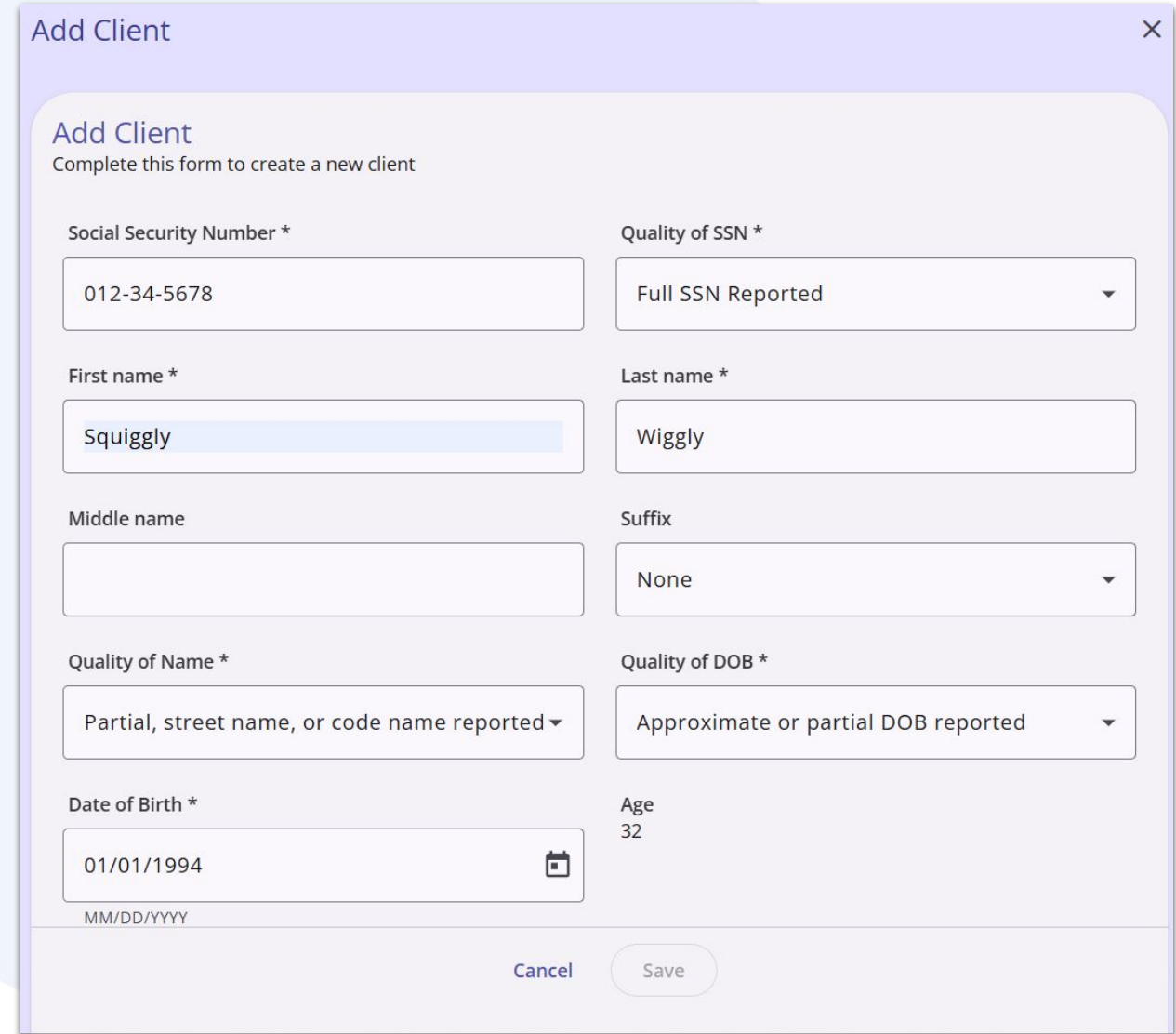


Client Profile Creation

If an existing client profile is not found, [a new client profile can be created](#) on the client search window by selecting the **Add (+) icon**.

A window will appear where you'll record info about the client including Universal Data Elements (UDEs) and some privacy preferences:

- Name
- SSN
- DOB
- Race and Ethnicity
- Veteran Status
- ROI Permission



The screenshot shows a 'Add Client' window with a title bar and a close button. The form is titled 'Add Client' and includes the instruction 'Complete this form to create a new client'. The form is divided into two columns. The left column contains fields for 'Social Security Number *' (012-34-5678), 'First name *' (Squiggly), 'Middle name' (empty), 'Quality of Name *' (Partial, street name, or code name reported), and 'Date of Birth *' (01/01/1994). The right column contains fields for 'Quality of SSN *' (Full SSN Reported), 'Last name *' (Wiggly), 'Suffix' (None), 'Quality of DOB *' (Approximate or partial DOB reported), and 'Age' (32). At the bottom right, there are 'Cancel' and 'Save' buttons.

Add Client

Add Client
Complete this form to create a new client

Social Security Number *
012-34-5678

Quality of SSN *
Full SSN Reported

First name *
Squiggly

Last name *
Wiggly

Middle name
None

Suffix
None

Quality of Name *
Partial, street name, or code name reported

Quality of DOB *
Approximate or partial DOB reported

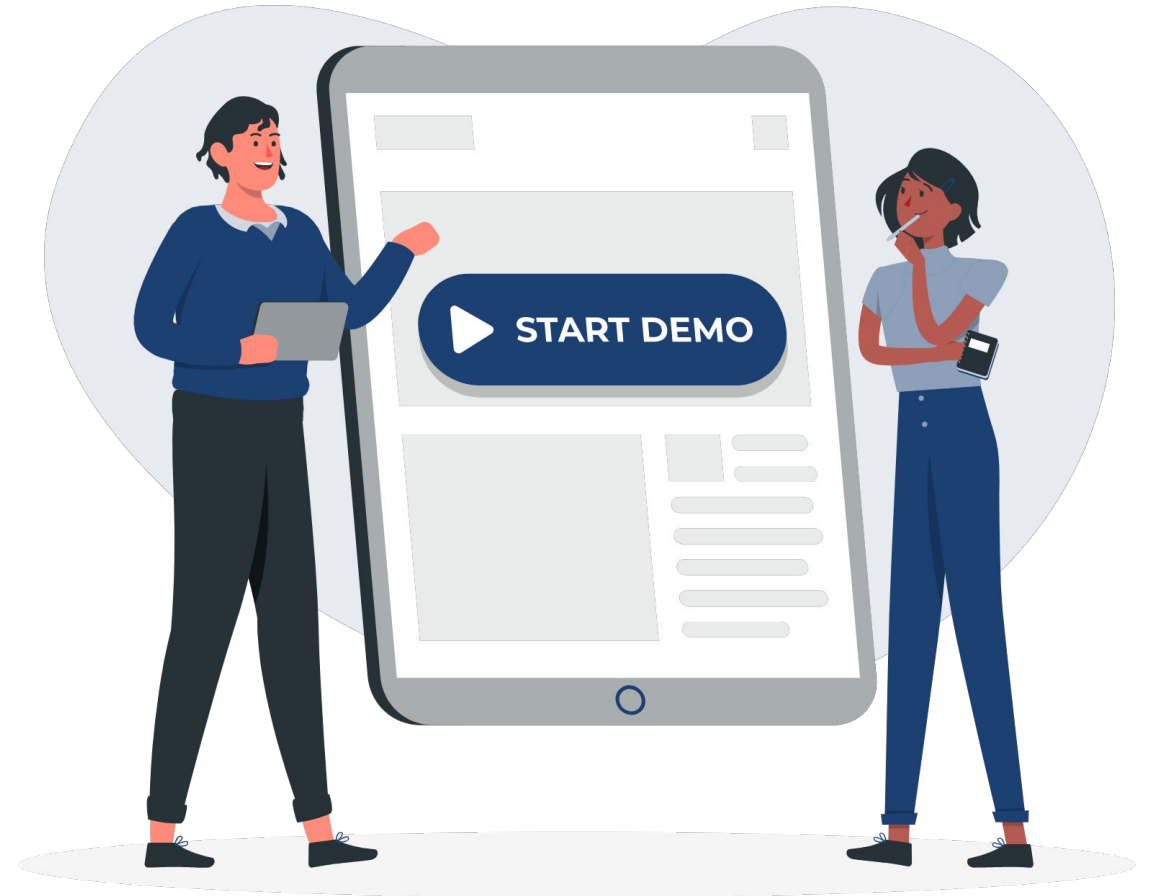
Date of Birth *
01/01/1994

Age
32

MM/DD/YYYY

Cancel Save

Search and Create A Client Profile Demo



Graphic by: <https://storyset.com/online>

Client Household - Adding Members

In the client record, the client household tab displays the following household information:

- **Current household members:** Active members of the client's household
- **Former household members:** Previous members of the client's household
- **Previous household history:** Prior households the client was a member in

Users can add new members to the household by selecting the **Add (+) icon**. New household members can be added by:

- Quick add from recently viewed clients
- Client search of existing client records
- Add new client record

The screenshot displays the 'Blossom Puff' client record in a software interface. The left sidebar contains navigation options: Profile, Privacy, Household (highlighted with an orange box), Reports, Care Team, History, Programs, Assessments, Notes, Files, and Contacts. The main content area is titled 'Current household members' and shows a table of active members. Below this, there are sections for 'Former household members' and 'Previous household history', both showing zero counts. At the top right, there are buttons for 'Program Referral', 'Community Queue', and 'No Contact Information'.

Client	Join Date ↑
BP Blossom Puff Sister	8/18/26 1 months 7 days ago
BP Buttercup Puff Sister	8/18/26 1 months 7 days ago
BP Bubbles Puff Sister	8/26/26 30 days ago

Program Entry/Enrollments

To enter a client in a program:

1. Select the desired project from the list of projects available under the agency, click **Next**.
2. Select members from the client's Global Household to the project enrollment by toggling the button next to their name, click **Next**.
3. Complete the enrollment screen for each client joining the project, click **Save and Complete**.

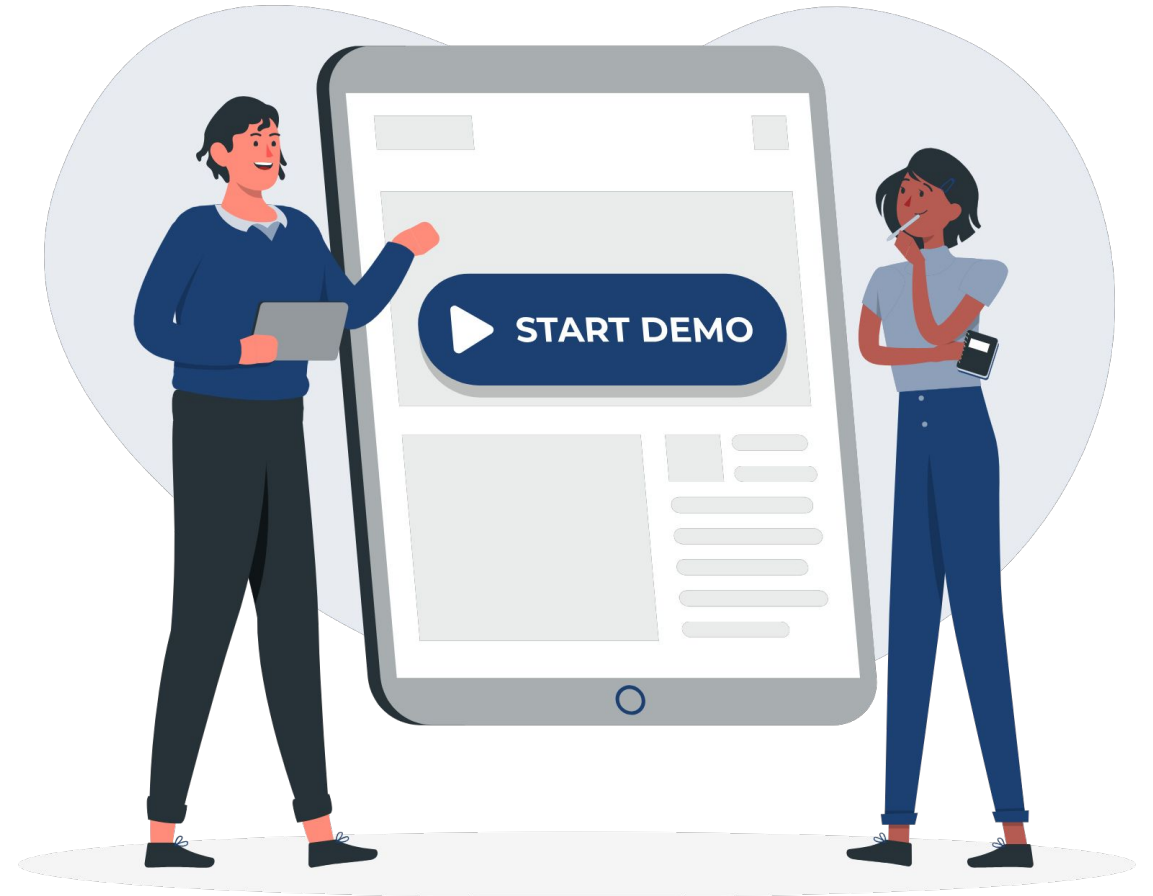
Once the entry information has been completed for each member, their enrollment will appear under their client record.

The screenshot shows a web form titled "Add program enrollment" with a close button (X) in the top right corner. Below the title is a step indicator "1 Select program". The main content area is titled "Available Programs" with the instruction "Select the program for the enrollment". It contains a table with a "Name" header and a list of programs, each with a dropdown arrow and a colored icon (CF, EF, or HF). The programs listed are:

Name
CoC Funded Family Coordinated Entry Training Project
CoC Funded Permanent Supportive Housing Training Project
CoC Funded Rapid Re-Housing Training Project
CoC Funded Survivor CES Project
CoC Funded Transitional Housing Training Project
ESG Funded Homeless Prevention Training Project
ESG Funded Rapid Re-Housing Training Project
ESG Funded Street Outreach Project
ESG Funded Transitional Training Program
HOPWA Funded Day Shelter Training Program

At the bottom right of the list is a pagination indicator "1 - 10 of 32" with left and right arrow buttons. A blue "Next" button is located at the bottom center of the form.

Add Household Member and Create Enrollment



Graphic by: <https://storyset.com/online>

Notes

To enter an [enrollment-level note](#):

1. Under Programs, select the desired program from the lists available under the agency, navigate to the Notes tab on the right. Click **Add**. Enter in your note information.
 - a. This includes: Title, Category, Date and time spent (if applicable).

Case Notes (Notes): Case Notes should be used to track information regarding the client's enrollment.

Housing Notes ([Provide Services](#)): Housing Notes should be used for information related to housing the client. These notes will be shared with the CoC in order to streamline the housing process for the client and to coordinated care among multiple agencies.

The screenshot displays the 'Notes' tab in a web application. The top navigation bar includes links for Events, Home, History, Group, Assessments, and Notes (which is highlighted with a red box). Below the navigation bar, the 'Notes' section is titled 'Notes' with the subtitle 'Manage enrollment-level notes for the client'. A large, empty text input field is present. Below this, a modal form for adding a new note is shown. The form includes the following fields: 'Title *' with the value 'CM Log 09/25/26'; 'Category *' with a dropdown menu set to 'Case Management'; 'Date *' with the value '09/25/2026' and a calendar icon; 'Hours' with a dropdown menu set to '1 hour'; 'Minutes' with a dropdown menu set to '15 min'; and 'Note *' with a rich text editor containing the text 'Met with participant for our bi-weekly resource planning session.' The rich text editor has a toolbar with icons for undo, redo, bold, italic, link, and list. At the bottom of the form, there are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted by a red box. A small 'POWERED BY CKEditor' logo is visible in the bottom right corner of the note editor.

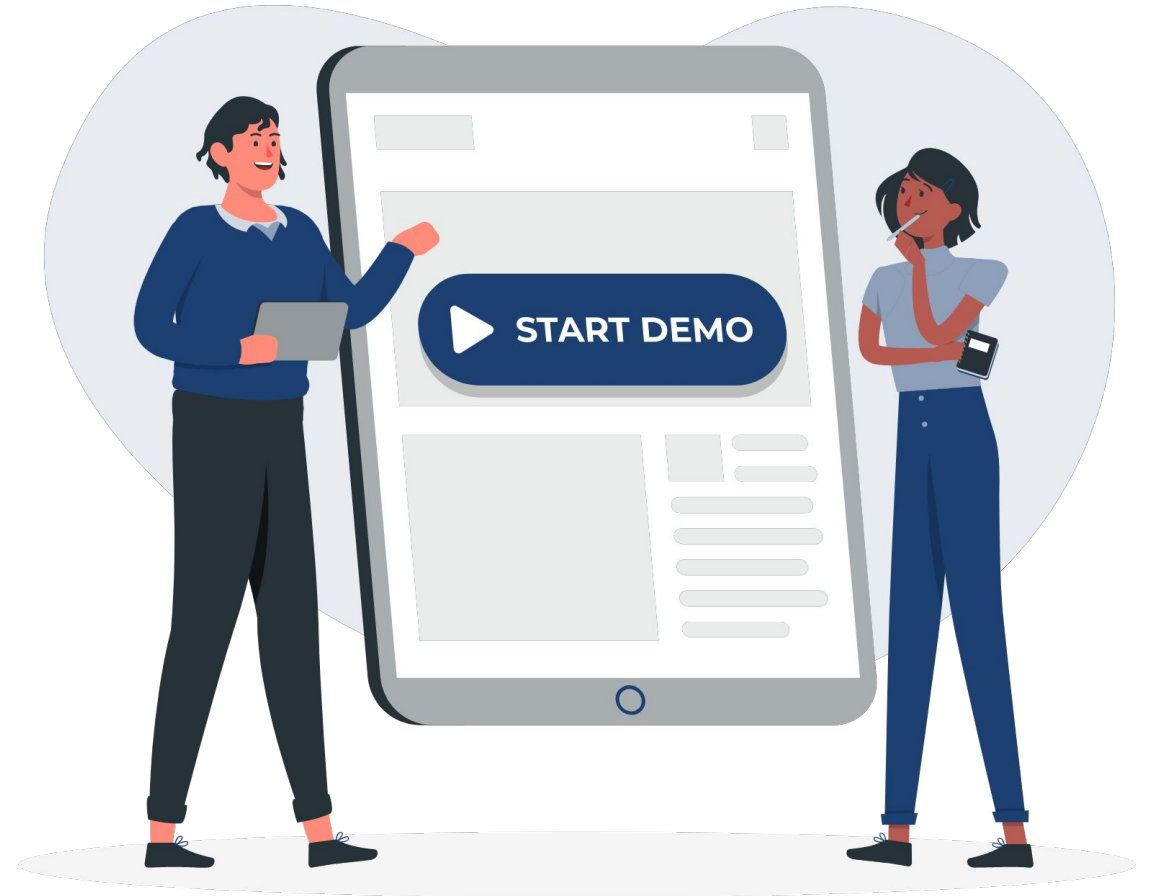
Services Tab

To [add a service](#):

1. Navigate to the program enrollment, then the Services tab to the right. Click **Add**. A list of available services will show up. Select the service, click **Next**.
2. A list of available service items will appear, select the service item. Enter in the service information and click **Save**, then click **Complete**.

The screenshot shows a web application window titled "Add a service item" with a close button (X) in the top right corner. On the left side, there is a vertical progress bar with three steps: "Select a service" (marked with a checkmark), "Select a service item" (marked with a checkmark), and "Provide service" (marked with a blue circle containing the number 3). The main content area is titled "Provide service" and includes a subtitle "Provide Bag of Groceries from the Food service" with a lock icon. The form contains the following fields: "Service Name" with the value "Food", "Category" with the value "Food", "Date" with the value "09/25/2026" and a calendar icon, "Event Date *" with the value "09/25/2026" and a calendar icon, "Expense" section with "Expense Amount *" set to "0.00", "Expense Date *" set to "09/25/2026" with a calendar icon, and "Funding Source" set to "No Funding Source" with a dropdown arrow. At the bottom, there is a "Notes" section with a "Note" label and a text area containing a rich text editor toolbar (undo, redo, bold, italic, link, unlink, bulleted list, numbered list) and an empty text box. At the very bottom of the form are "Cancel" and "Save" buttons.

Add Notes & Services



Graphic by: <https://storyset.com/online>

History Tab

The History tab is the “central hub” of the client record.

It includes a complete history of prior or active:

- Service Items
- Program Enrollments
- Referrals and Reservations
- Assessments
- Coordinated Entry Events

Users can hover over any icons on the screen to prompt a tooltip containing information about the event.

History

View a history of interactions with this client

Search

▼		Springfield Homeless Shelter A Springfield Agency This entry added by Hugo Ambriz from primary agency Syst...		8/19/26 1 months 5 days ago Start Date
▼		AFH Homekey A Springfield Agency This entry added by Hugo Ambriz from primary agency Syst...		8/19/26 1 months 5 days ago Start Date
▼		Springfield RRH Project A Springfield Agency This entry added by Hugo Ambriz from primary agency Syst...		8/19/26 1 months 5 days ago Start Date
▼		Springfield PSH Test Project A Springfield Agency This entry added by Hugo Ambriz from primary agency Syst...		8/19/26 1 months 5 days ago Start Date
▼		Non-Federally Funded Street Outreach Trainin... OC Training Agency This entry added by Diana Taylor from primary agency Sy...		10/22/24 1 years 11 months 2 days ago Start Date
▼		Food:Bag of Groceries OC Training Agency This entry added by Diana Taylor from primary agency Sy...		10/16/24 1 years 11 months 8 days ago Start Date

Program Exits

To exit a client or household:

1. Navigate & select the **Programs** tab on the left.
2. Select the Program you will exit the client from.
3. Navigate and select **Exit**.
4. Select household members (if applicable).
5. Enter in exit data for client(s)
6. Click **Save and Next**.
7. Select **Complete**.

Add an exit

1 Include household members (optional)

2 Blossom Puff exit screen

Program enrollment: Exit
Exit data collection for Blossom Puff

Project Exit Date *

09/25/2026

MM/DD/YYYY

Destination *

Select

Staying or living with friends, permanent tenure

Moved from one HOPWA funded project to HOPWA PH

Rental by client, no ongoing housing subsidy

Rental by client, with ongoing housing subsidy

Owned by client, with ongoing housing subsidy

Owned by client, no ongoing housing subsidy

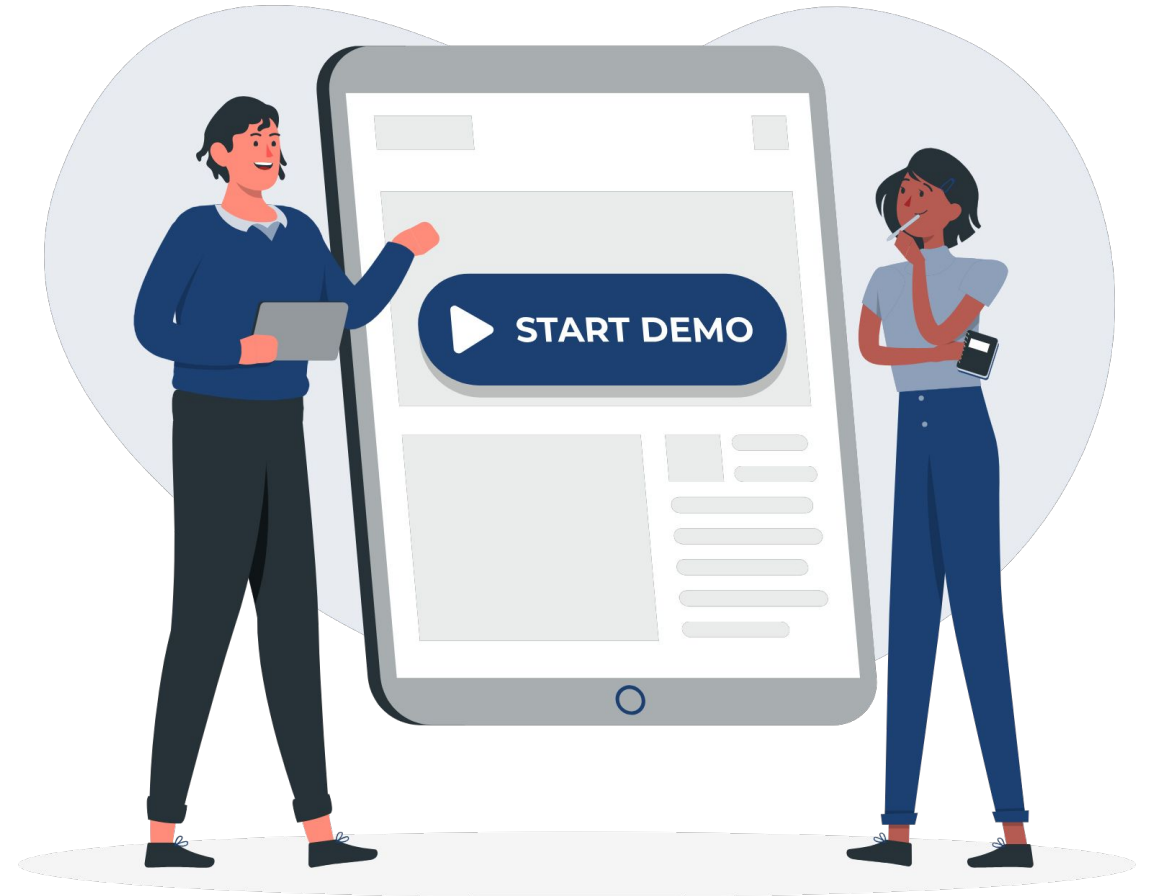
Developmental Disability *

No

Chronic Health Condition *

No

History Tab & Program Exit



Graphic by: <https://storyset.com/online>

CES Workflow for Access Point

1. Enroll the client into the appropriate CES project
2. Add a Current Living Situation Assessment (CLS)
3. Add 3rd party Homeless Verification Form and CES Authorization Form to the client record
4. Complete the CES Assessment
 - a. Bed Reservation Assessment if applicable
5. Send Client to the Community Queue
 - a. Bed Reservation Queue if applicable
6. Access Point complete CLS every 90 days or as needed to keep the client active

KB: [Coordinated Entry System \(CES\) for Case Managers](#)



Graphic by: <https://storyset.com/online>

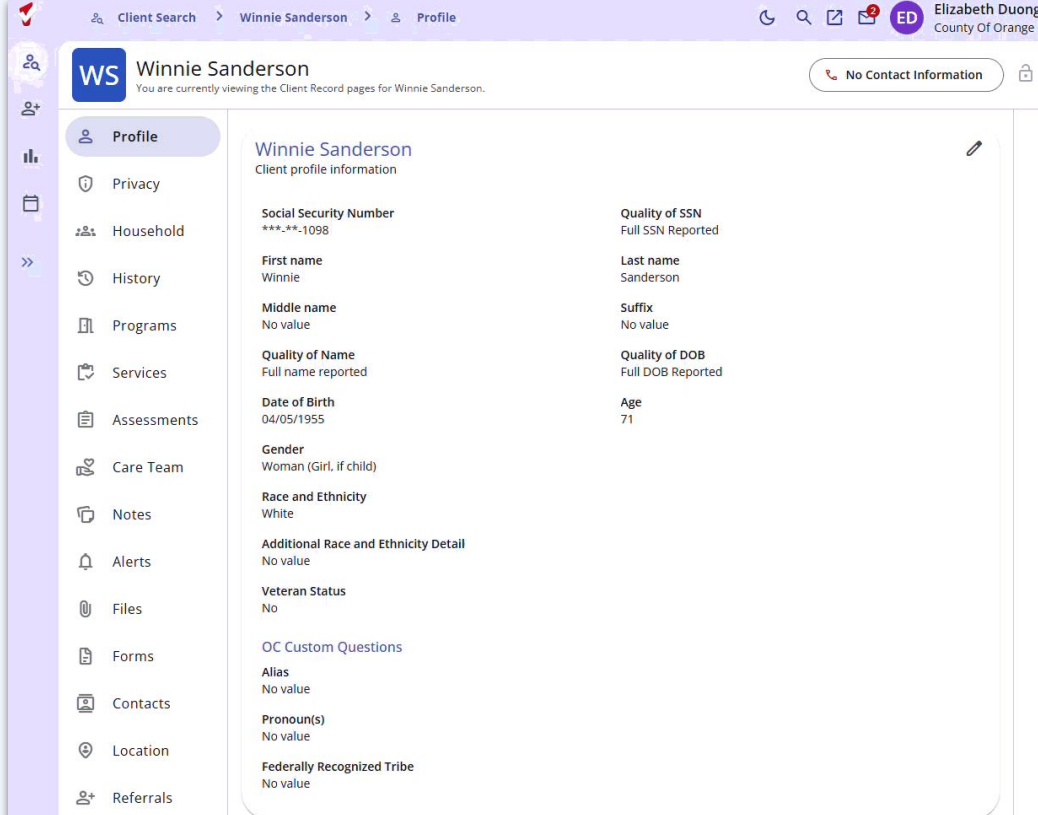
CES Enrollment

1. Switch over to **County of Orange**
2. Select the appropriate CES projects from the list of projects available under the County of Orange, click Next.
 - a. Family CES - at least one minor child (ages 0-17), an expectant (pregnant) mother, or in the reunification process with minor child(ren)
 - b. Individual CES - Adult-only households
3. Complete the enrollment screen by filling out the entry screen data elements
4. Complete the **Current Living Situation**
5. Click Save and Complete.

The top screenshot shows the 'Profile' page for Winnie Sanderson. The breadcrumb trail is 'Client Search > Winnie Sanderson > Profile'. The left sidebar has icons for Profile, Privacy, Household, History, Programs, Services, Assessments, Care Team, Notes, Alerts, Files, Forms, Contacts, Location, and Referrals. The main content area shows 'Winnie Sanderson' with 'Client profile information'. It includes a 'Social Security Number' field with the value '***-**-1098' and a 'Quality of SSN' field with the value 'Full SSN Reported'. On the right, there is a 'Switch Agency' dropdown menu with 'County Of Orange' selected. The bottom screenshot shows the 'Programs' page for Winnie Sanderson. The breadcrumb trail is 'Client Search > Winnie Sanderson > Programs'. The left sidebar is the same as the top screenshot. The main content area shows 'Winnie Sanderson' with 'You are currently viewing the Client Record pages for Winnie Sanderson.' Below this, there is a 'Program enrollments' section with a search bar and a message that says 'No results yet! Results will be displayed here when they are available.'

Upload CES Documentation

1. Navigate to the **Files** tab from the Client Navigation Menu
2. Select the **Add Icon (+)**
3. Select Coordinated Entry Documentation, then select the appropriate file label and upload the CES doc
4. Click **Save**



The screenshot shows a web application interface for a client named Winnie Sanderson. The top navigation bar includes a search icon, the text 'Client Search > Winnie Sanderson > Profile', and a user profile for 'Elizabeth Duong, County Of Orange'. Below the navigation bar, the main content area is titled 'WS Winnie Sanderson' with a sub-header 'You are currently viewing the Client Record pages for Winnie Sanderson.' A sidebar on the left contains a list of tabs: Profile (selected), Privacy, Household, History, Programs, Services, Assessments, Care Team, Notes, Alerts, Files, Forms, Contacts, Location, and Referrals. The main content area displays the 'Winnie Sanderson Client profile information' form. The form is organized into two columns. The left column contains fields for Social Security Number (***-**-1098), First name (Winnie), Middle name (No value), Quality of Name (Full name reported), Date of Birth (04/05/1955), Gender (Woman (Girl, if child)), Race and Ethnicity (White), Additional Race and Ethnicity Detail (No value), Veteran Status (No), OC Custom Questions (Alias: No value, Pronoun(s): No value, Federally Recognized Tribe: No value), and Age (71). The right column contains fields for Quality of SSN (Full SSN Reported), Last name (Sanderson), Suffix (No value), and Quality of DOB (Full DOB Reported). A 'No Contact Information' button is located at the top right of the form area.

Winnie Sanderson Client profile information	
Social Security Number ***-**-1098	Quality of SSN Full SSN Reported
First name Winnie	Last name Sanderson
Middle name No value	Suffix No value
Quality of Name Full name reported	Quality of DOB Full DOB Reported
Date of Birth 04/05/1955	Age 71
Gender Woman (Girl, if child)	
Race and Ethnicity White	
Additional Race and Ethnicity Detail No value	
Veteran Status No	
OC Custom Questions Alias No value Pronoun(s) No value Federally Recognized Tribe No value	

Previewing Client Files

1. Navigate to the **Files tab** from the Client Navigation Menu
2. Under **Preview** hover over the **PDF icon**
3. Click **Preview**
4. A pop window will appear with the file

The screenshot shows a web application interface for viewing client files. The top navigation bar includes a search bar, the client name 'Joe Moe', and the user 'Jocelyn Morales, County Of Orange'. A sidebar on the left contains a navigation menu with icons for Household, Reports, Units/Beds, Care Team, History, Programs, Assessments, Notes, **Files** (highlighted), Contacts, and Location. The main content area is titled 'Client files' and displays a table of files for the client. The table has columns for File, Uploaded Date, File Name, File Size, and Preview. Two files are listed, both uploaded on 9/18/26 Today. The first file is 'Coordinated Entry Documentation Homelessness Verification: Third Party County of Orange' (994.9 KB) with a PDF icon in the preview column. The second file is 'Coordinated Entry Documentation CES Authorization Form County of Orange' (1.7 MB) also with a PDF icon. The right sidebar contains several widgets: 'Active Referral' with a 'Check-In' button, 'Community queues' showing a 'Bed Reservation' queue with 1 item, and a list of other client-related metrics like 'Household' (4), 'Active programs' (3), 'Active services' (1), and 'Recent Services and Events' (1).

File	Uploaded Date	File Name	File Size	Preview
Coordinated Entry Documentation Homelessness Verification: Third Party County of Orange	9/18/26 Today	ThirdPartyVerificationForm_2025.pdf	994.9 KB	
Coordinated Entry Documentation CES Authorization Form County of Orange	9/18/26 Today	CESAuthorizationFormGeneral_02_2026.pdf	1.7 MB	

Create a CES Assessment

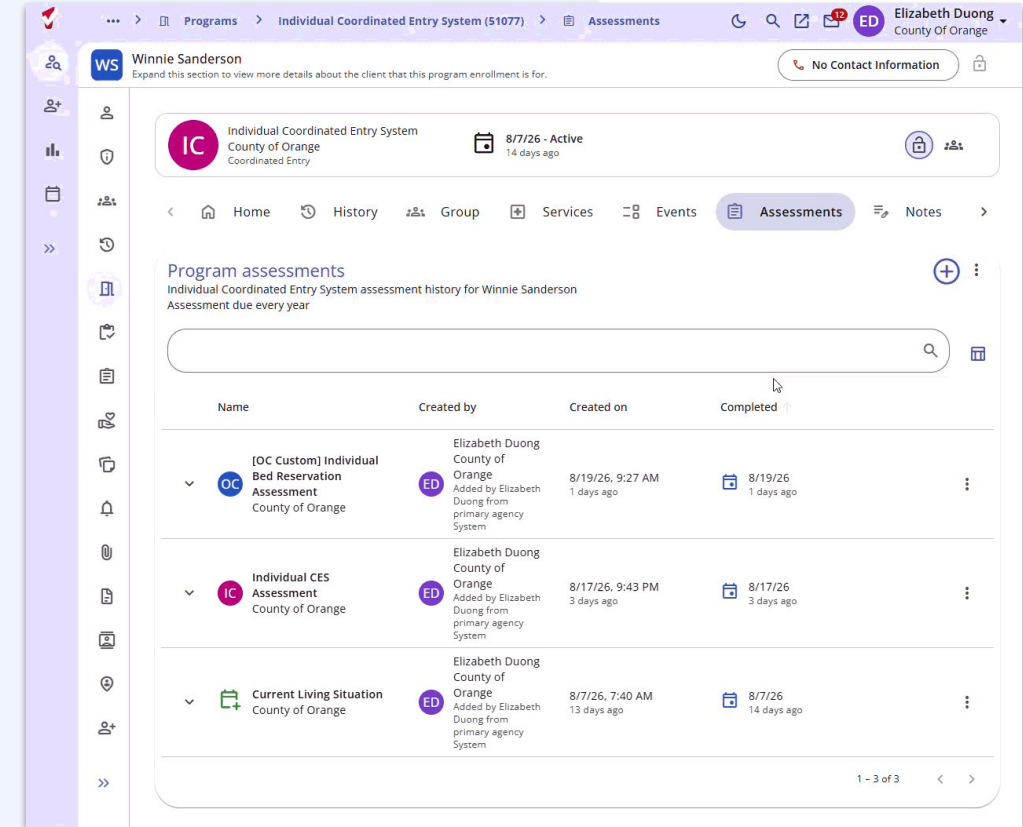
1. Navigate to the **Programs** tab from the Client Navigation Menu and click on the CES enrollment
2. Select **Assessments**
3. Select the **Add Icon** (+)
4. Add the client's housing preferences and list any accessibility needs
5. Click **Save**

The screenshot displays the ICES web application interface. The top navigation bar shows the user is logged in as Elizabeth Duong, County Of Orange. The left sidebar contains a navigation menu with options: Profile, Privacy, Household, History, Programs (selected), Services, Assessments, Care Team, Notes, Alerts, Files, Forms, Contacts, Location, and Referrals. The main content area is titled 'Program assessments' and shows the assessment history for Winnie Sanderson. A table lists the assessments, with one entry visible: 'Current Living Situation' created by Elizabeth Duong on 8/7/26. The 'Assessments' tab in the top navigation bar is highlighted, and the 'Add Icon' (+) is visible next to it.

Name	Created by	Created on	Completed
Current Living Situation County of Orange	Elizabeth Duong County of Orange Added by Elizabeth Duong from primary agency System	8/7/26, 7:40 AM 10 days ago	8/7/26 11 days ago

Refer Client to Community Queue (CQ)

1. Under the client's CES enrollment select **Assessments** then select **Show more actions** and select View **Eligibility**
2. From the Community Queue Referral screen, select the **Add Icon (+)**
3. Select **Coordinated Entry System**
4. Click **Save** and **Complete**



The screenshot displays the 'Individual Coordinated Entry System (51077)' interface for 'Winnie Sanderson'. The 'Assessments' tab is selected, showing a list of program assessments. The table includes columns for Name, Created by, Created on, and Completed. The assessments listed are:

Name	Created by	Created on	Completed
[OC Custom] Individual Bed Reservation Assessment County of Orange	Elizabeth Duong County of Orange Added by Elizabeth Duong from primary agency System	8/19/26, 9:27 AM 1 days ago	8/19/26 1 days ago
Individual CES Assessment County of Orange	Elizabeth Duong County of Orange Added by Elizabeth Duong from primary agency System	8/17/26, 9:43 PM 3 days ago	8/17/26 3 days ago
Current Living Situation County of Orange	Elizabeth Duong County of Orange Added by Elizabeth Duong from primary agency System	8/7/26, 7:40 AM 13 days ago	8/7/26 14 days ago

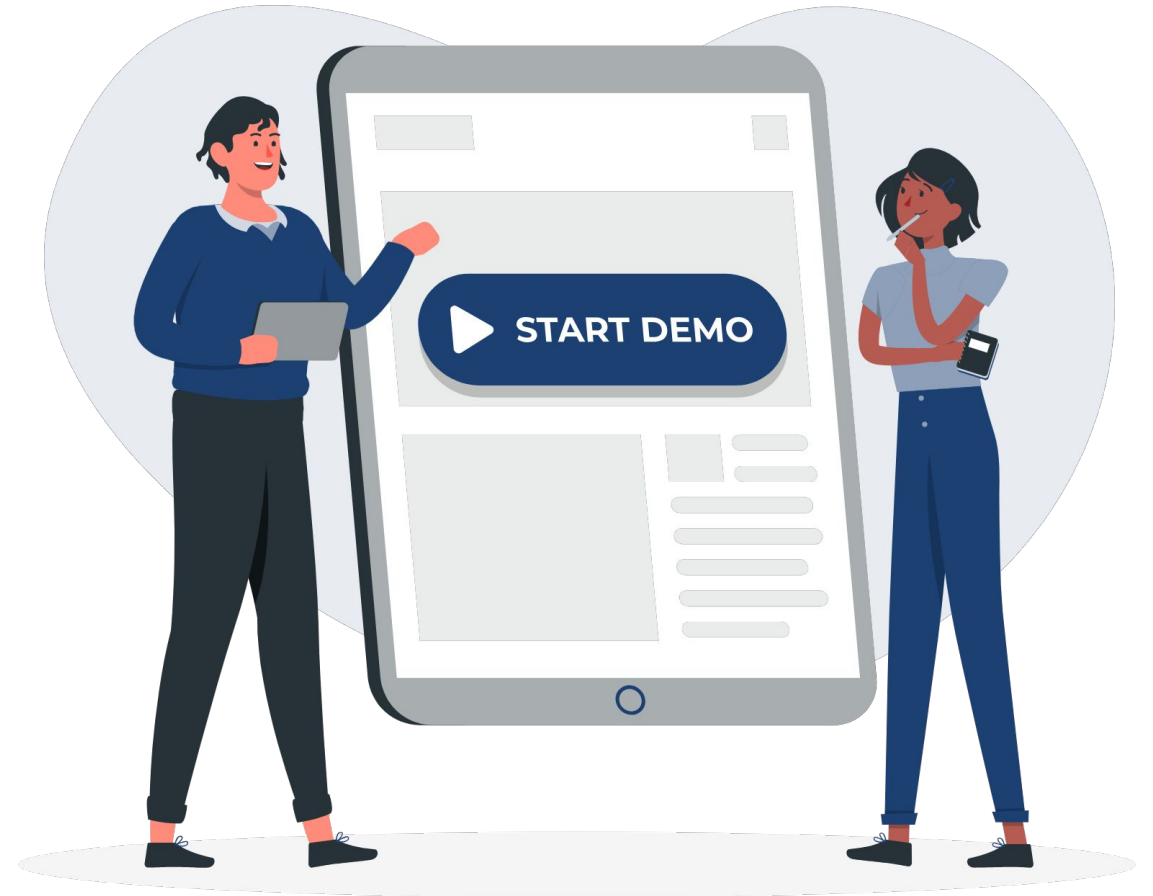
Keep Client Active on the Community Queue (CQ)

While a household is on the Community Queue, their case manager should check in with them regularly. If a household is on the Community Queue for more than 90 days with no activity, their referral will be automatically removed.

- Add an updated Current Living Situation
- Complete a “Check In”
- Add a Note to the Head of Household’s record
- Add a Coordinated Entry Event

The screenshot shows a web application interface for the Individual Coordinated Entry System (IC). The top navigation bar includes a search icon, a list icon, a calendar icon, a mail icon, and a user profile icon for Elizabeth Duong, County Of Orange. The main header displays the client's name, Winnie Sanderson, and a status of 8/7/26 - Active, 14 days ago. Below the header, there is a tabbed interface with tabs for Home, History, Group, Services, Events, Assessments, Notes, Files, and a right arrow. The Assessments tab is currently selected. The main content area is titled 'Edit Client Program' and includes a sub-header 'Update client program for Winnie Sanderson in Individual Coordinated Entry System'. The form contains several fields: Project Start Date (08/07/2026), Prior Living Situation (Type of Residence: Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/subway station/airport or anywhere outside)), Length of Stay in Prior Living Situation (One year or longer), Approximate date this episode of homelessness started (01/01/2025), Number of times on the streets, in ES, or Safe Haven in the past three years (One Time), Total number of months homeless on the streets, in ES, or Safe Haven in the past three years (More than 12 Months), Disabling Conditions and Barriers (Disabling Condition: No, Physical Disability: No, Developmental Disability: No).

Workflow to Refer Client to CQ Demo



Graphic by: <https://storyset.com/online>

Bed Reservation Workflow for Access Points

Step 1: Ensure a 3rd party homeless verification is uploaded

Step 2: Complete the Bed Reservation Assessment

Step 3: Refer Head of Household to the Bed Reservation Queue

Step 4: Add Bed Reservation Service (**ongoing**)

Refer to the [Adding Households to the Bed Reservation Queue](#) Knowledge Base article for more information.



Complete the Bed Reservation Assessment

1. Navigate to the **CES Program Enrollment** from the Client Navigation Menu
2. Select **Assessments**
3. Select the **Add Icon** (+) next to Bed Reservation Assessment
4. Add the client's shelter preferences and answer eligibility questions
5. Click **Save**

The screenshot displays the FCES interface for a client named Joe Moe. The top navigation bar shows the path: Programs > Family Coordinated Entry System (55845) > Assessments. The client's profile header includes the name 'Joe Moe' and a note to 'Expand this section to view more details about the client that this program enrollment is for.' Below this, the 'Family Coordinated Entry System' card shows the client's status as '9/17/26 - Active' (2 days ago). The main content area features a tabbed interface with 'Assessments' selected. Under 'Program assessments', it states 'Family Coordinated Entry System assessment history for Joe Moe' and 'Assessment due every year'. A table lists the assessment details:

Name	Created by	Created on	Completed
Current Living Situation County of Orange	Jocelyn Morales County of Orange Added by Jocelyn Morales from primary agency System	9/17/26, 4:19 PM 1 days ago	9/17/26 2 days ago

The interface also includes a search bar, a sidebar with various icons, and a footer indicating '1 - 1 of 1'.

Refer Client to Bed Reservation Queue

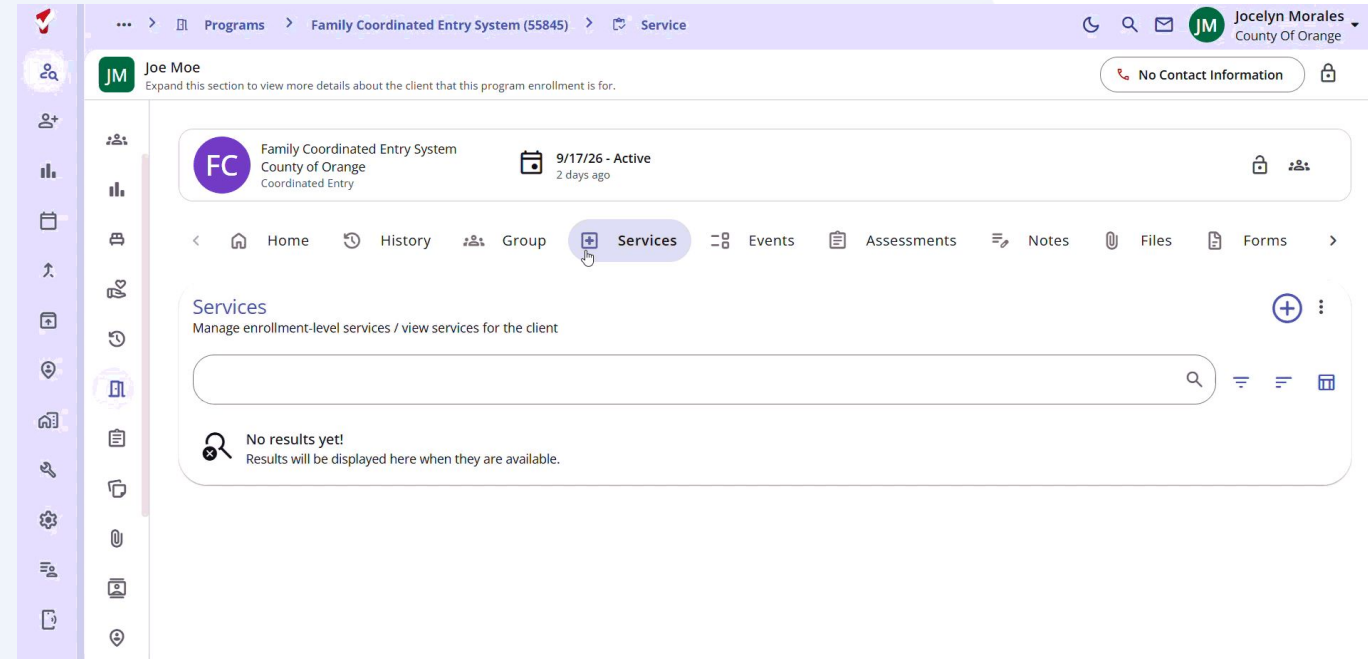
1. Under the *Client's CES Enrollment*, select **Assessments** and then click on **Show more actions** and select View **Eligibility**
2. From the Community Queue Referral screen, select the **Add Icon** (+)
 - The referral is automatically assigned to the appropriate queue based on the completed assessment
3. Click **Save** and **Complete**

The screenshot displays the FACES interface for a client named Joe Moe. The top navigation bar shows the path: Programs > Family Coordinated Entry System (55845) > Assessments. The user is logged in as Jocelyn Morales, County Of Orange. The left sidebar contains various icons, with the 'Assessments' icon highlighted. The main content area is titled 'Program assessments' and shows the 'Family Coordinated Entry System assessment history for Joe Moe'. Below this, there is a table of assessments.

Name	Created by	Created on	Completed
FC Family CES Assessment County of Orange	Jocelyn Morales County of Orange Added by Jocelyn Morales from primary agency System	9/18/26, 9:38 AM Today	9/18/26 Today
OC [OC Custom] Family Bed Reservation Assessment County of Orange	Jocelyn Morales County of Orange Added by Jocelyn Morales from primary agency System	9/18/26, 9:32 AM Today	9/18/26 Today
Current Living Situation	Jocelyn Morales County of Orange	9/17/26, 4:19 PM	9/17/26

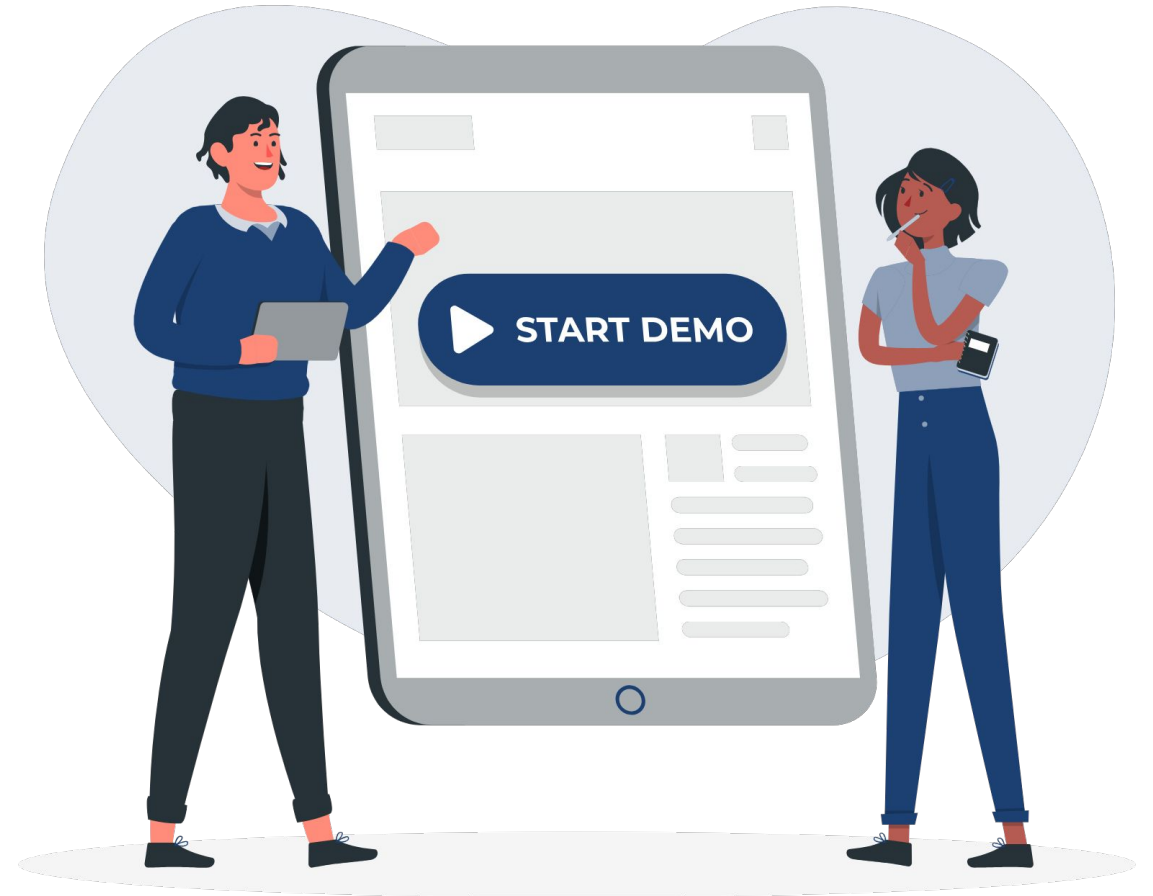
Add Bed Reservation Service Weekly to Keep Client Active

1. Navigate to the **CES Program Enrollment** from the Client Navigation Menu
2. Select **Services**
3. Select the **Add Icon (+)**
4. Select **Bed Reservation Wait List** and click **Next**
5. Select **Needs Bed Reservation Assistance** and click **Next**
6. Click **Save**



NOTE: This service should be added weekly, before the 7th day to keep the client active on the Bed Reservation Queue.

Workflow to Refer Client to Bed Reservation Queue Demo



Graphic by: <https://storyset.com/online>

CES Workflow for Housing Provider

1. Add Housing Opportunities
2. Review Pending Referrals
3. Record a Referral Outcome
 - a. Send Referral Back to Community Queue if applicable
 - b. Exit Household from CES Enrollment if applicable

KB: [Community Queue for Housing Agencies](#)



Graphic by: <https://storyset.com/online>

Add Housing Opportunities

Each housing agency is responsible for entering and updating any housing opportunities at their agency. This can be done by accessing the Availability tab on the Referrals page. Each agency must enter their project's housing opportunities in order to receive matches from either Community Queue.

1. Select Program that has an housing opportunity
2. Include as much detail as possible for appropriate matches to the housing opportunity
3. Add additional details in the Note textbox
4. Click **Save** and **Complete**

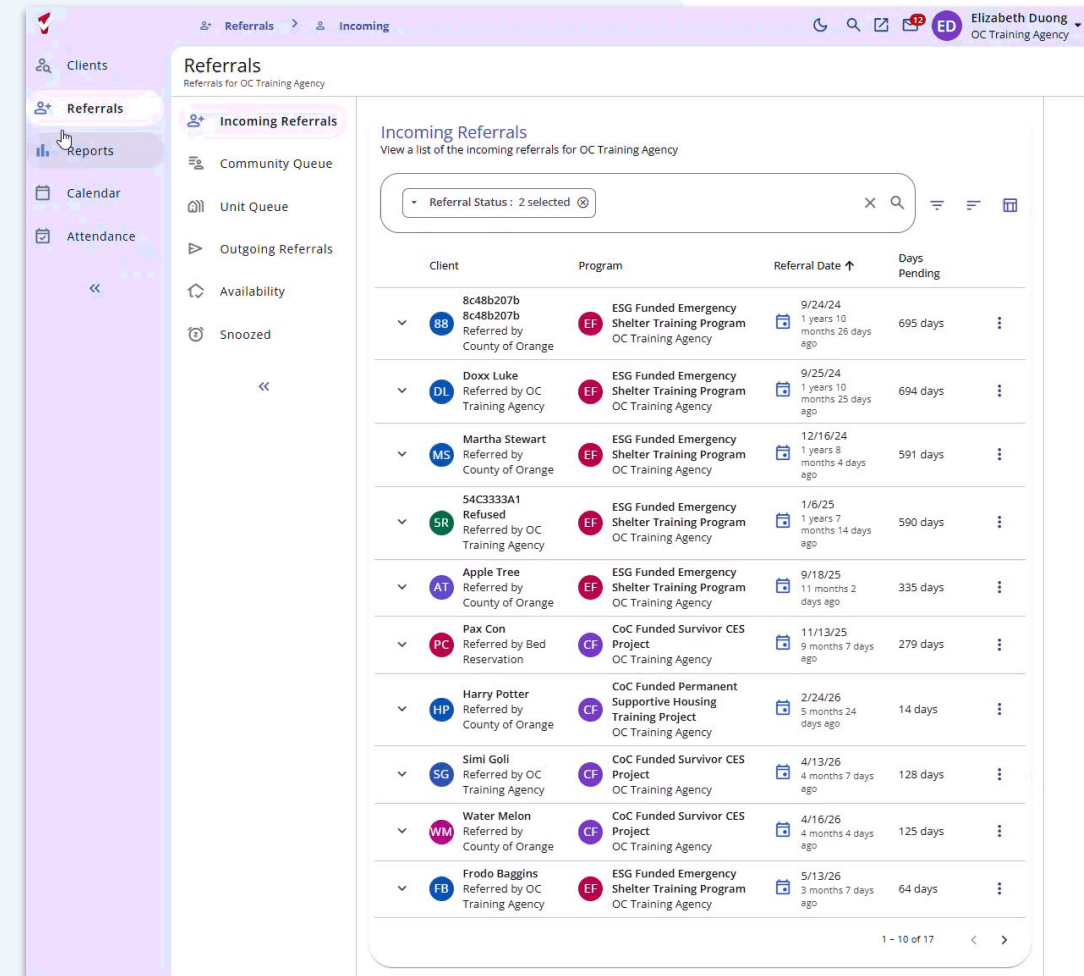
The screenshot shows the 'Referrals' page for the 'OC Training Agency'. The 'Availability' tab is selected, displaying a table of program openings. The table has columns for Program, Availability, Openings, and Community Queues. The 'Coordinated Entry System' is selected as the entry system. The table lists various programs with their respective availability and opening counts.

Program	Availability	Openings	Community Queues
VASH Funded Permanent Supportive Housing Training Project PH - Permanent Supportive Housing (disability required for entry)	Limited	2	Coordinated Entry System
SSVF Funded Rapid Re-Housing Training Project PH - Rapid Re-Housing	Limited	0	Coordinated Entry System
ESG Funded Homeless Prevention Training Project Homelessness Prevention	None	0	Coordinated Entry System
CoC Funded Homeless Prevention Training Project Homelessness Prevention	None	0	Coordinated Entry System Bed Reservation
CoC Funded Permanent Supportive Housing Training Project PH - Permanent Supportive Housing (disability required for entry)	Limited	27	Coordinated Entry System
CoC Funded Rapid Re-Housing Training Project PH - Rapid Re-Housing	Limited	23	Coordinated Entry System
ESG Funded Rapid Re-Housing Training Project PH - Rapid Re-Housing	Limited	5	Coordinated Entry System
Non-Federally Funded Rapid Re-Housing Training Project PH - Rapid Re-Housing	Limited	1	Coordinated Entry System
Non-Federally Funded Homeless Prevention Training Project Homelessness Prevention	Limited	0	Coordinated Entry System
Non-Federally Funded Housing With Services (No Disability Required) Training Project PH - Housing with Services (no disability required for entry)	None	0	Coordinated Entry System Bed Reservation

Review Pending Referrals

Once a Matchmaker has matched a household to a housing opportunity, the housing provider must review the match and determine whether or not the household is eligible for the project. Agency Administrators will be notified via email when a household has been matched to a housing opportunity at the agency.

1. Navigate to the **Referrals** screen from the Primary Navigation Menu
2. Select **Incoming Referrals**
3. Select referred Client Referral to review additional details



Referrals
Referrals for OC Training Agency

Incoming Referrals
View a list of the incoming referrals for OC Training Agency

Referral Status: 2 selected

Client	Program	Referral Date ↑	Days Pending
8c48b207b 8c48b207b Referred by County of Orange	ESG Funded Emergency Shelter Training Program OC Training Agency	9/24/24 1 years 10 months 26 days ago	695 days
Doxx Luke Referred by OC Training Agency	ESG Funded Emergency Shelter Training Program OC Training Agency	9/25/24 1 years 10 months 25 days ago	694 days
Martha Stewart Referred by County of Orange	ESG Funded Emergency Shelter Training Program OC Training Agency	12/16/24 1 years 8 months 4 days ago	591 days
54C333A1 Refused Referred by OC Training Agency	ESG Funded Emergency Shelter Training Program OC Training Agency	1/6/25 1 years 7 months 14 days ago	590 days
Apple Tree Referred by County of Orange	ESG Funded Emergency Shelter Training Program OC Training Agency	9/18/25 11 months 2 days ago	335 days
Pax Con Referred by Bed Reservation	CoC Funded Survivor CES Project OC Training Agency	11/13/25 9 months 7 days ago	279 days
Harry Potter Referred by County of Orange	CoC Funded Permanent Supportive Housing Training Project OC Training Agency	2/24/26 5 months 24 days ago	14 days
Simi Gali Referred by OC Training Agency	CoC Funded Survivor CES Project OC Training Agency	4/13/26 4 months 7 days ago	128 days
Water Melon Referred by County of Orange	CoC Funded Survivor CES Project OC Training Agency	4/16/26 4 months 4 days ago	125 days
Frodo Baggins Referred by OC Training Agency	ESG Funded Emergency Shelter Training Program OC Training Agency	5/13/26 3 months 7 days ago	64 days

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Exiting Household from CES

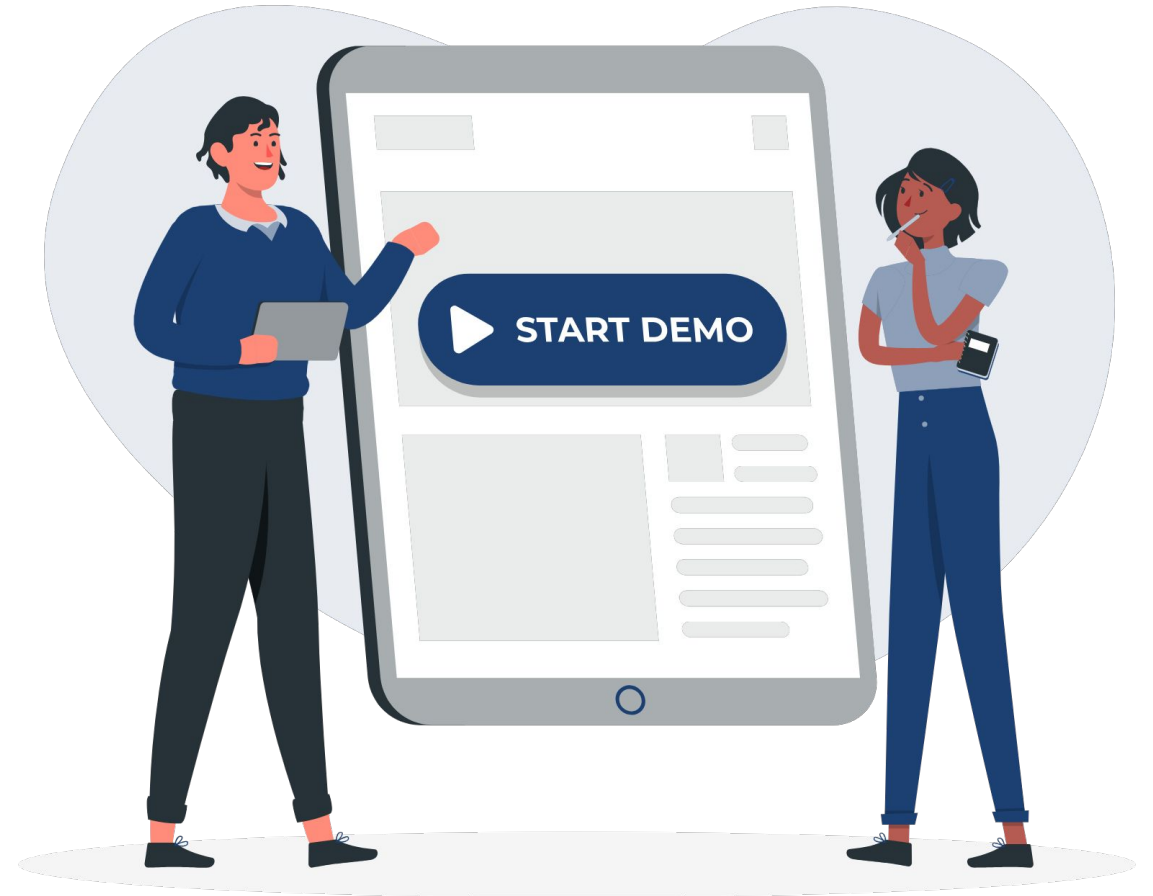
Once the housing provider has determined that the household is eligible for their project and the household has confirmed that they wish to be assisted by the project, the case manager should enroll the household into the agency's housing project.

Households referred to a housing opportunity through the Coordinated Entry System will also need to exit the household from the Coordinated Entry System project.

1. Enroll client into your agency's PH program
2. Once household is housed, exit the household from CES enrollment to close out their CES participation.

The screenshot shows a web application interface for a Coordinated Entry System (CES). The top navigation bar includes a search icon, the text 'Client Search > Harry Potter > Profile', and a user profile for 'Elizabeth Duong' from 'OC Training Agency'. The main content area is titled 'HP Harry Potter' and displays 'Client profile information'. A left sidebar contains a list of menu items: Profile, Privacy, Household, History (highlighted with a hand cursor), Programs, Services, Assessments, Care Team, Notes, Alerts, Files, Forms, Contacts, Location, and Referrals. The main profile section contains the following fields: Social Security Number (masked as ***-**-****), First name (Harry), Quality of Name (No value), Date of Birth (01/01/2000), Gender (No value), Race and Ethnicity (No value), Additional Race and Ethnicity Detail (No value), OC Custom Questions (Alias: No value, Pronoun(s): Select, Federally Recognized Tribe: No value, Specify Other Tribe: No value), Quality of SSN (No value), Last name (Potter), Quality of DOB (No value), and Age (26). A 'No Contact Information' button is located in the top right corner of the profile section.

Workflow for Housing Providers Demo



Graphic by: <https://storyset.com/online>

September 2026 Clarity New Interface Survey

The HMIS Team invites users to complete our Clarity New Interface Office Hour Survey. The feedback from the survey is used to improve the content and quality of future webinars.

We'd greatly appreciate any feedback.

Thank you!

Survey: <https://forms.gle/GN4GzuVo9BPAmCtU9>



Graphic by: <https://storyset.com/online>

Q&A

Reminder: Please enter your agency name in the chat box for attendance

Training materials and recording will be available on the [OC HMIS website](#)



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